Arnold Schwarzenegger
Governor

PREPARING REPORTS FOR THE PUBLIC INTEREST ENERGY RESEARCH (PIER) PROGRAM

GUIDELINES

Prepared By:
California Energy Commission
Public Interest Energy Research Program

JANUARY 2006
CEC-500-2006-006

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PREPARING REPORTS FOR THE PUBLIC INTEREST ENERGY RESEARCH (PIER) PROGRAM

GUIDELINES

JANUARY 2006

This document contains information on preparing reports for your PIER research project. Please go to www.energy.ca.gov/contracts to ensure you have the most recent version of this document.

Finalizing Technical Research Reports - Overview

These guidelines are intended to assist Commission Contract Managers and Contractors when finalizing a Public Interest Energy Research (PIER) report.

Be sure to check these guidelines before initiating *any* PIER report. If your contract is for technical research that resulted in a deliverable(s) such as an interim report, technical report, final report, or presentation, please follow these Guidelines. The most recent version of these Guidelines and associated templates are located at: www.energy.ca.gov/contracts. The Contract Terms and Conditions provide additional references for the production of PIER reports.

If you are not sure these guidelines apply to your report or if you have any questions about the information provided in the Guidelines, please contact your Energy Commission Contract Manager or email the TechTransfer Unit at: TechTransfer@energy.state.ca.us.

Included in this package you will find the following documents to help you prepare your reports:

1. Roles and Responsibilities for Finalization of PIER Reports
2. Guidance on Preparing Accurate, Consistent Reports
3. Outline for PIER Final Reports
4. Formatting California Energy Commission Reports
5. Style Formatting Guidelines
6. Format, Tips and Tools Example
7. Report Telegram Example
8. Cover Page Example
9. Title Page Example
10. Use of PIER Report Templates

Appendix 1: Format, Tips and Tools Template
Appendix 2: PIER Report Cover Page Template
Appendix 3: PIER Report Title Page Template

Report Triage Meeting:

Prior to final preparation of reports for publication, there will be a Report Triage Meeting. The purpose of the Report Triage Meeting is to assess the actions needed to finalize the report. The objectives of the Report Triage Meeting include clarification of who will do what by when and how, to ensure that the report is consistent with the PIER report guidelines, the technical accuracy of the report is preserved, and that the report is distributed appropriately.

Report Triage Meeting participants will include the Commission Contract Manager, the Contractor, Tech Transfer staff , and may include others to assist with editing and formatting.

1. Roles and Responsibilities for Finalization of PIER Reports

The Contractor is responsible for:

- The technical accuracy of information provided.
- Formatting and content of reports as prescribed at: www.energy.ca.gov/contracts.
- Participating in the Report Triage Meeting.
- Making changes as determined in the Report Triage Meeting.

The Commission Contract Manager is responsible for:

- Reviewing the report for technical accuracy and ensuring the report meets the contract requirements.
- Conformance of the report to the Energy Commission's report guidelines and standards found at: www.energy.ca.gov/contracts.
- Ensuring the Program Area Lead or the Office Manager has agreed that the report is ready for finalization and/or publication.
- Completing the most recent PIER Cover and Tile pages (see Appendix 2 and Appendix 3).
- Emailing a Report Telegram to the Technology Transfer Unit initiating the report finalization process (see page 18 of the "Guidelines" for the content of this email). The attachments to the telegram include the Cover and Title page files and the draft final report file.
- Determining which meeting participants, in conjunction with Technology Transfer staff, are needed to participate in the Report Triage Meeting.
- Participating in the Report Triage meeting.

Technology Transfer is responsible for:

- Tracking the report finalization process from submittal of a Report Telegram to final distribution, which may include posting to the web, library and/or contract file.
- Providing the publication number to the Commission Contract Manager for inclusion on the Cover page.
- Coordinating the report finalization process including the Report Triage Meeting.
- Coordinating formatting and editing services.
- Ensuring all assignments made by the Report Triage Meeting participants have been completed.
- Providing the completed report to the Energy Commission's WebMaster for web posting, if applicable.
- Notifying the Commission Contract Manager and Contractor of the web location of the report.
- Copying and manual distribution of the report.

2. Guidance on Preparing Accurate, Consistent Reports

1. Put on the hat of an inquisitive, reasonably well-educated lay reader. Pretend that they just paid for this research project and want to understand how and why you spent their money.
2. Apply the test of completeness. Are all the pieces there? Are all the references clear and do those in the text match those in the reference section? Are the relationships between the partners and the players clearly explained?
3. Apply the test of logic. Does the document flow and make sense? Is the need for the research clearly described? Is the technical approach clearly described? Do the conclusions make sense? Are they drawn from the analysis? Do the numbers check? Is it clear how the numbers were derived?
4. If the project did not do everything it intended to do, explain.
5. The Final Report must primarily address the Agreement scope of work. Doing this will help manage the scope and the effort required for this report. Some research projects are Stage X (e.g., one stage of Stages and Gates) of a longer-term program and all work done during the time the Energy Commission was involved was funded by all of the partners. In other cases, the work being done in this Stage of the program had more tasks than the Energy Commission participated in, although some of the results of this work may have affected, or been affected by the other tasks. The Energy Commission-funded portion of the research project (or program) needs to be clearly differentiated from the overall program of which this portion of the research is a part. Comments about the program should not be intermingled with those about the project. If some objectives of the program will be performed elsewhere, or at another time, this needs to be explained, and the report should only focus on the project at hand.
6. There needs to be a clear relationship between project objectives and outcomes.
7. The methods used to conduct the research need to be explained.
8. Data that are presented in the report need to be analyzed. If you present a picture, graph or table, be sure that you discuss it in the text, not just refer to it.
9. Each conclusion needs to be substantiated by the analysis contained in the report.
10. Figures and Tables must clearly relate to and be consistent with the text, and vice versa. (If the text says the generator had a capacity of 30 kilowatts, the table should not say it was 31.2 kilowatts.)
11. Use consistent references to report performance specifications and results. For example, if a piece of equipment is to be referred to by its nominal nameplate rating, then use that reference consistently throughout the report. If, however, the desired number was the measured performance of the device, (almost always different from nameplate) then consistently use that measured number. Do not mix the two in the narrative.
12. The text needs to clearly refer to the attached appendices. It should also explain how the data in the appendices matter to the text. If it does not really matter, it probably should be dropped. (You may still need it because it is a deliverable according to the Agreement, so check this carefully.) References to multi-page appendices need to be specific to the page or section of the appendix, not just a general reference to Appendix 10.

3. Outline for PIER Final Reports

Sections

PIER Reports contain the following sections, in the following order:

Cover Page (required)

Title Page (required) and Legal Notice (the Energy Commission notice is always included; others are optional)

Acknowledgement and Citation Page (Acknowledgement optional; citation required)

Preface

Table of Contents (required)

Abstract (required)

Keywords (required in the **Abstract**)

Executive Summary (required)

Introduction* (required)

Project Approach [or Methods – select one]* (required)

Project Outcomes [or Results* - select one] (required)

Conclusions and Recommendations* (required)

References* (if applicable)

Glossary (if more than 10 acronyms are used, this is required)*

Appendices (if applicable)

Attachments (if applicable)

*Please number these headings and subheadings in the following style: 1.0, 1.1, 1.1.1, and 1.1.1.1; 2.0, 2.1, 2.1.1, etc.

Titles for the middle sections (Introduction, Project Approach or Methods, Project Outcomes or Results, Conclusions, and Recommendations) may vary; however, the other section titles are mandatory. Each section must start on a new page.

To view an example of a PIER final report, see: http://www.energy.ca.gov/pier/final_project_reports/CEC-500-2005-205.html (Energy Commission-hosted site)

Cover Page and Title Page

Please create one page containing the following information, which the Energy Commission Contract Manager (CCM) will use to create a standardized Energy Commission cover page and title page.

- Title of the report
- Name of primary author(s) or principal investigator
- Author's company, organization, or affiliation
- Location of author's company, organization, or affiliation (city, state)
- Name of Energy Commission/PIER Project Manager
- PIER Program Area
- PIER Program Area lead
- Contract number and name (and work authorization name and number or project name and number, if applicable)
- Publication number (leave blank: this information will be provided later by PIER)
- Publication month and year

Legal Notice

Please provide the following California Energy Commission legal notice (also known as the "Disclaimer") verbatim on your draft:

Legal Notice

This report was prepared as a result of work sponsored by the California Energy Commission (Energy Commission). It does not necessarily represent the views of the Energy Commission, its employees, or the State of California. The Energy Commission, the State of California, its employees, contractors, and subcontractors make no warrant, express or implied, and assume no legal liability for the information in this report; nor does any party represent that the use of this information will not infringe upon privately owned rights. This report has not been approved or disapproved by the Energy Commission, nor has the Energy Commission passed upon the accuracy or adequacy of this information in this report.

(If any other participating organization needs a legal notice on the document, please provide it.)

Acknowledgements Page

This page acknowledges or expresses appreciation to those who participated in the project. It may be a paragraph or a bulleted list of names and, if appropriate, their affiliations.

Citation

At the bottom of the Acknowledgements page, include the citation for the report in the following style:

Please cite this report as follows:
Author last name, Author first name. Year of publication. *Report title.* California Energy Commission, PIER. Publication number.

(**Example:** San Francisco Public Utilities Commission. 2006. *Hetch Hetchy Case Study.* California Energy Commission, PIER. CEC-500-2006-002.)

Table of Contents

Sections to be included in the Table of Contents are as follows. Titles for the Introduction, Project Approach or Methods, Project Outcomes or Results, Conclusions, and Recommendations sections may vary—the other titles are mandatory.

Preface
Abstract (include Keywords)
Executive Summary
1.0 Introduction

1.1 Background and Overview (why this project was necessary)
1.2 Project Objectives (what you planned to accomplish)
1.3 Report Organization
2.0 Project Approach [or Method – select one]
3.0 Project Outcomes [or Results – select one]
4.0 Conclusions and Recommendations
4.1 Conclusions
4.2 Commercialization Potential (if applicable)
4.3 Recommendations (if applicable)
4.4 Benefits to California
5.0 References
6.0 Glossary (if used)
Appendices (if used)
Attachments (if used)
List of Figures
List of Tables

Preface

Use the following Preface verbatim. Fill in the contract name and number, organization, report title, and PIER program area in the second-to-last paragraph:

Preface

The Public Interest Energy Research (PIER) Program supports public interest energy research and development that will help improve the quality of life in California by bringing environmentally safe, affordable, and reliable energy services and products to the marketplace.

The PIER Program, managed by the California Energy Commission (Energy Commission) conducts public interest research, development, and demonstration (RD&D) projects to benefit the electricity and natural gas ratepayers in California. The Energy Commission awards up to $62 million annually in electricity-related RD&D, and up to $15 million annually for natural gas RD&D.

The PIER program strives to conduct the most promising public interest energy research by partnering with RD&D organizations, including individuals, businesses, utilities, and public or private research institutions.

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PIER funding efforts are focused on the following RD&D program areas:

- Buildings End-Use Energy Efficiency
- Industrial/Agricultural/Water End-Use Energy Efficiency
- Renewable Energy Technologies
- Environmentally Preferred Advanced Generation
- Energy-Related Environmental Research
- Energy Systems Integration

[*Report name*] is the [final, interim, technical – select one] report for the [project name] project (contract number XXX-XX-XXX, [work authorization number]) conducted by [research entity]. The information from this project contributes to PIER's [RD&D program area]

For more information on the PIER Program, please visit the Energy Commission's Web site at **www.energy.ca.gov/pier** or contact the Energy Commission at (916) 654-5164.

Abstract

The abstract is a concise (< 200 words), informative statement of the report's purpose, scope, methods, and major findings, including the report's results, conclusions, and recommendations—essentially a very brief Executive Summary. Abstracts are published by abstracting services to help readers determine whether or not the report is targeted to their area of interest; therefore, it should be understandable as a stand-alone document. The abstract should not contain undefined symbols, abbreviations, or acronyms, and should not refer to specific numbered elements of the main report. It should not refer to other research literature unless it is essential to do so to clarify the document's purpose. It *must* contain 5–10 keywords for computer searches and be geared toward a more technical audience. The keywords should be listed separately.

Executive Summary

The Executive Summary is a final report in miniature, containing all the key information. It summarizes the report, and must use the following subheads:

- Introduction
- Purpose (outlining the broad purpose)
- Project Objectives (those that are measurable and foreseeable)
- Project Outcomes
- Conclusions
- Recommendations
- Benefits to California

The Executive Summary is intended to be short (preferred length is 2–3 pages). It can use a succinct, bulleted format to summarize the pertinent points under each of these sections, or can be more conversational (but still succinct). Assume a non-technical, management-level readership. If your report covers more than one project, repeat this organization for each project area. As a summary of the report, the Executive Summary should not present new information that is not found in the main document. See the Energy Commission website (www.energy.ca.gov/reports/reports_500.html) for examples.

1.0 Introduction

Background and Overview — Provide relevant background; define (at an intelligent layperson's level) the problem being addressed by the project; identify the project's subject area and research goals. Refer to the contract for this information.

Project Objectives — present the technical and economic objectives for your project. The objectives need to express how to measure or know whether or not the objectives have been achieved. This information should be taken from the contract and should reflect any changes made during the course of the project. (Describe *why* these changes were made in the Project Approach section.)

Each objective shall be separately identified, a useful form is:

Project objectives were to

- Verify (an action verb followed by relevant text)….
- Determine….
- Measure…

Report Organization — provides a roadmap to the rest of the report.

2.0 Project Approach [or Methods – select one]

This section discusses the tasks you undertook and what you did to accomplish your objectives. Discuss the testing procedures you undertook and any system modifications and improvements you made.

3.0 Project Outcomes [or Results – select one]

This section presents your results. Please organize them in the same order as the objectives. An easily readable style is to state a brief version of each Outcome in bulleted form and then follow each bullet with supporting paragraphs that describe each Outcome; although any well-organized presentation will be accepted.

There can be more Outcomes than there were Objectives, because there may be more than one Outcome per Objective, or you may have found an unanticipated Outcome during your research. However, you cannot have stranded objectives; all Objectives, whether met or not, must be discussed in this section. If this section is particularly long, then it may be useful to summarize the outcomes at the end of the section.

4.0 Conclusions and Recommendations

Conclusions — Conclusions must be drawn from evidence presented in the report, and there must be a conclusion for every objective presented earlier. Present your conclusions either in priority order or in the same order as the objectives presented earlier. You may have conclusions that are broader than individual Objectives and Outcomes. If so, please present these after you present the individual conclusions.

Commercialization Potential — if your project had a task to prepare a Production Readiness Plan or a similar effort related to assessing where the research is in relationship to being used in its relevant markets; please discuss that task in this section.

Recommendations — Specific recommendations for future research should derive from the conclusions presented, and should be presented in the same priority order as those conclusions. Specific recommendations should broadly describe the research initiative(s), provide a rationale and include an estimate of the funding level required; it is acceptable to provide an estimate as a range (low to high dollar amount). Also, include an estimate of the time required to carry out the recommended next steps. (For example, would this be a multi-year study requiring three to five years or would this be a scoping study that would be feasible to complete in a year?). Please be succinct. General recommendations should follow. Please do not add specifics on the time and cost of follow-on activities in the Executive Summary.

Benefits to California — This section may discuss two issues: (1) the benefits that California has already received from this contract (if applicable), and (2) how California will or could benefit from the results of this project. These benefits need to be related to the problems that this research was intended to address; however, discussion of ancillary benefits is also encouraged. Refer to the Introduction section of the report—the list of benefits in both sections should be identical.

5.0 References

The references must list all documents cited in the body of the report. List references in standard bibliographic format. It is preferred that you use type font "Chicago" to list your references. Please check that all of the references contained in the body of the report are accurate and that the full citation for each reference is listed in the References section.

Any documents referred to in the Appendices should be listed in the reference section in the appropriate Appendix.

6.0 Glossary

If there are more than 10 acronyms used in the report, please provide a glossary with definitions for each acronym at the end of the report.

Appendices

Appendices are designated as follows: Appendix 1, Appendix 2, Appendix 3, etc. For documents with a large download size, appendices are posted by the Energy Commission as separate PDFs from the main document. All appendices must be either part of the main document or presented as separate PDF files.

Attachments

Attachments are discouraged, but if absolutely required, they are designated by Roman numerals.

General Information

- The abbreviation "CEC" or simply "Commission" is not allowed in final reports. Use "California Energy Commission" at first mention, and then use "Energy Commission" throughout the rest of the report.
- The Energy Commission does not permit the use of the first person in technical reports.
- Please use serial comma style throughout. (e.g., "…the research team tested the first, second, and third models…").
- Use "smart" quotes and apostrophes.
- Use "n" dashes for ranges of numbers.
- Use only one space between sentences.
- Use italics, not quotation marks, to introduce new technical terms.

4. Formatting California Energy Commission Reports

Styles

Contractors should use the PIER report styles. These styles are carried in the *Format, Tips and Tools* Sample on page 17 and also provided as a template in Appendix 1.
They are:

Style Name	Appearance
Bullet, b	Palatino, 11 pt. (bullet is indented 0.5□ from the left)
Centered Titles, ct	Palatino, 14 pt., bold, centered
Centered TOC Titles, toc	Palatino, 14 pt., bold, centered
Figure title, ft (caption)	Arial, 11 pt., bold, centered
Heading 1,1	Arial, 11 pt., bold (1.0)*
Heading 2,2	Arial, 11 pt., bold (1.1)*
Heading 3,3	Arial, 11 pt., bold (1.1.1)*
Heading 4,4	Arial, 11 pt., bold (1.1.1.1)*
Normal	Palatino, 11pt.
Table title, tt (caption)	Arial, 11 pt., bold, centered

* Although these headings are the same font and point size, they are differentiated by increased indention at every level. In addition, Headings 1,1 and 2,2 use title case capitalization, while Headings 3,3 and 4,4 use sentence capitalization.

Numbered headings must be used for all four levels. Please use the following style: 1.0, 1.1, 1.1.1; 2.0, 2.1, 2.11, etc.

The *Centered Titles* style is for centered title heads (such as Acknowledgements), that do not appear in the report's Table of Contents.

The *Format, Tips and Tools template* can be turned into a template and "attached" to the report, so that the specific styles are available in Word. To do so:

1. Go to *Format, Tips and Tools template* on Page 17 or to Appendix 1 and save it as a template (.doc) document.
2. Open the report document, click on "Tools," then "Templates & Add-ins."
3. Select "Attach," and select and open *Format, Tips and Tools*. This will add the styles to the report document.

Pagination

Pagination must begin on the Acknowledgement/Citation page (as i, ii, iii…) and continue in lower case Roman numerals through the Abstract. On the first page of the Executive Summary, begin numbering "1" and continue sequential numbering throughout the document. Use Palatino, 10 pt. for page numbers.

Table of Contents

The Table of Contents is usually generated automatically if using Microsoft Word. It is based on the style headings assigned to each section. For the "Preface" line, two periods must be manually entered directly after the word "Preface," so that the page number falls in the correct place. The Table of Contents should be updated after each series of edits, and as the last task before creating the PDF.

Figures and Tables

Figures and Tables can use any style that presents the information clearly and is readable.
Figure and table captions need to be formatted as a "caption" style, then highlighted and reformatted as either a Figure (Figure Title, ft) or a Table (Table Title, ft), so that they can generate automatic Lists of Figures and Lists of Tables in the Table of Contents and be cross-referenced.

Appendices

Appendices can use whatever format and style the contractor deems appropriate. They are not edited or reformatted by the Energy Commission, so please ensure that the material is accurate and presented clearly.

If the main document and appendices together result in a large file size (i.e., a lengthy download), the Appendices are posted on the Energy Commission web site as separate PDF documents, and a hyperlink from the main document's table of contents links to them when placed online. When the appendices are separate documents, they use a cover page and are identified as an appendix on the appendix document itself.

If the Appendices are presented as separate PDFs, a "slipsheet" for each appendix must be inserted on its own page at the end of the main report. These pages should be formatted as follows:

Appendix 1 (centered, and assigned a "Centered Titles, ct" style)
Title of appendix (centered, and assigned a "Centered Titles, ct" style)

Each subsequent appendix slipsheet page should be formatted similarly, and each must have its own page.

The first page of each appendix should be a cover sheet, identical in formatting to the slipsheet mentioned above. For the second page:

- If the material has been published previously, and it carries its own page numbering, leave the historical numbering as it is.

- If the material does not already have page numbering, number those pages A-2, A-3, A-4, etc.

Attachments

Follow the same guidelines as those for Appendices. Create a cover page in the same style as the slipsheet pages above and "number" them "Attachment I," "Attachment II," and so forth. The page numbering of each attachment should remain as it is.

Footnotes/Endnotes

Endnotes are not permitted. Footnotes should be used sparingly to briefly clarify terms or concepts that may not be understood by the average reader. Footnotes are placed at the bottom of the page on which they appear. Do not place footnotes at the end of each section.

In-text Citation

PIER reports use the Author/Date system of citation in the text, as follows: (Author 2004). There is no comma between the author(s) names and the date. For multiple citations, please use the following style: (Brown 2004; Goodwin 2002; Aler et al. 2000; Kumesh 2004a, 2004b).

5. Style Formatting Guidelines

Applies to:	Style Name	Style Definition
All text that is not assigned a special style (e.g., heading, bullet, caption)	Normal	PIER standard is Palatino 11. If this is not available, please use Times New Roman throughout the document. Be consistent by using the Normal style throughout the document. Text is justified.
Appendices		PIER does not usually edit Appendices
Attachments		PIER does not edit Attachments
Bullets	Bullet, b	Bullets should be indented 0.5" from left. Use the • bullet. A bulleted list is followed by a carriage return.
Captions		• All captions are in Sentence Case. • Captions are brief to describe the figure or table with minimal, if any, use of punctuation. • Captions do not introduce new information.
Equation Captions		Arial BOLD 11, Left above the Equation. Equations are numbered sequentially.
Figure Captions	Figure Title, ft	Arial BOLD 11, centered below the figure. Figures are labeled: Figure #. Title of figure (There is no period at the end of the caption unless it is a complete sentence.)
Table Captions	Table Title, tt	Arial BOLD 11, centered above the Table. Tables are labeled: Table #. Title of table (There is no period at the end of the caption unless it is a complete sentence.)
Equations		• Equations to be noted are centered on a new line. • Format text wrapping above and below. • Avoid the use of text boxes wherever possible and insert the equations directly into the document. • Every equation presented must be referred to in the text.

Figures		• Figures should be numbered sequentially, starting from the beginning of the document, not by section (i.e., they should be numbered Figure 1, Figure 2, Figure 3; not Figure 1-1, Figure 1-2, Figure 2-1). • Centered • Format text wrapping above and below. • Avoid the use of text boxes wherever possible and insert the figures directly into the document. • Every figure presented must be referred to in the text.
Graph Figures		• It is not necessary to title the graph if the title will be used in the caption. • Please label all axes. • Use Sentence case. • Include units.
Glossary		• Please use table format with word or acronym on the left side and the definition on the right side. • Both columns are left justified; column width is flexible.
Headings (level 1)	Heading 1,1	• PIER standard style is Arial BOLD 11. • Headings are in title case. • Headings are outline numbered. • There is no additional carriage return before the next paragraph or heading.
Headings (level 2)	Heading 2,2	• PIER standard style is Arial BOLD 11. • Headings are in title case. • Headings are outline numbered. • There is no additional carriage return before the next paragraph or heading.

Headings (level 3)	Heading 3,3	• PIER standard style is Arial BOLD 11. • Headings are in sentence case. • Headings are outline numbered. • There is no additional carriage return before the next paragraph or heading.
Headings (level 4)	Heading 4,4	• PIER standard style is Arial BOLD 11. • Headings are in sentence case. • Headings are outline numbered. • There is no additional carriage return before the next paragraph or heading.
Pagination		• Begin numbering "i" on the Acknowledgement/Citation page. • On the first page of the Executive Summary, begin numbering "1". • Use Palatino, 10 pt. • Centered, bottom. • See the Appendix and Attachments sections of this document for pagination of those sections.
References	Reference	0.5" hanging indent.
Tables		• Tables should be numbered sequentially, starting from the beginning of the document, not by section (i.e., they should be numbered Table 1, Table 2, Table 3; <u>not</u> Table 1-1, Table 1-2, Table 2-1). • Centered. • Format text wrapping above and below. • Avoid the use of text boxes wherever possible and insert the tables directly into the document. • Every Table presented must be referred to in the text.

Table Headings		• Column headings are centered. • Row headings are left justified. • Use Sentence case. • All headings are centered vertically.
Table Contents		• Text is left justified. • Numbers are either right justified or aligned by decimal. • All text is centered vertically. • Minimal (if any) use of punctuation.
Centered Title Headings Centered Titles apply to Title Headings not a part of the body of the paper (i.e., Acknowledgements, Table of Contents, List of Figures, and List of Tables.) These heads do not show in the Table of Contents.	Centered Titles, ct	• Palatino, 14 pt. bold, centered
Centered TOC Titles Centered TOC Titles will show in the Table of Contents	Centered TOC Titles, TOC	• Palatino, 14 pt. bold, centered

6. Format, Tips and Tools Example

Centered Title, ct (not linked to TOC)

[Legal Notice/Acknowledgement Page/Table of Contents]

Centered TOC titles, toc (linked to TOC)

Heading 1,1

Heading 2,2

Heading 3,3

Heading 4,4

- Bullet, b

➢If items are numbered, use “Bullet, b” format, then click on the numbered list button on the formatting menu bar. That will change the bullets to numbers.

Figure title, ft

[Placed underneath figure]

Table title, tt

[Placed above table]

Normal (text of report)

7. Report Telegram Example

When the Commission Contract Manager is ready to finalize a PIER report, they must initiate the TechTransfer Report Telegram. The Report Telegram is sent to: TechTransfer@energy.state.ca.us. The telegram must include the following items:

Title:

Author(s):

Publication Month/Year:

Commission Contract Manager (CCM):

Commission Contract Manager Program Area:

Commission Contract Number/Work Authorization Number/Project Number:

Type of Report:

> To: TechTransfer@energy.state.ca.us
>
> Subject: PIER Report Finalization Request
>
> Report Title: Identifying Distributed Energy Priorities
>
> Author(s): J.B. Author
>
> Publication Month/Year: January 2006
>
> Commission Contract Manager (CCM): Harry Lewis
>
> CCM Program Area: Energy Systems Integration and Environmental Research Office
>
> Commission Contract Number: 500-04-001
>
> Type of Report: [Final, Interim, Technical, other- explain]

8. PIER Report Cover Page Example

Arnold Schwarzenegger
Governor

TITLE GOES HERE
TYPE IN ALL CAPS AND USE
LINE BREAKS
WHERE THE TITLE NATURALLY BREAKS

PIER [FINAL, INTERIM, TECHNICAL]
PROJECT REPORT

Prepared For:
California Energy Commission
Public Interest Energy Research Program

Prepared By:
Company Name Goes Here

Company Logo
<u>may</u> be inserted
here

Month/Year GOES HERE

PUBLICATION # HERE

9. PIER Report Title Page Example

PUBLIC INTEREST ENERGY RESEARCH

"Research Powers the Future"

Prepared By:
Company
Manager Name
City, State
Contract No. 000-00-000

Prepared For:
Public Interest Energy Research (PIER) Program
California Energy Commission

Name
Contract Manager

Name
Program Area Team Lead

Name
Manager
NAME OF OFFICE

Name
Deputy Director
NAME OF DIVISION

B.B Blevins
Executive Director

10. PIER Report Templates – Provided as Appendices

For your convenience, the **Format, Tips and Tools Template** is provided as Appendix 1;
The **PIER Report Cover** is Appendix 2, and the **PIER Title Page** is Appendix 3.

The *Format, Tips and Tools template* can be turned into a template and "attached" to your report, so that the specific styles are available in Word.

To do so:

1. Go to the *Format, Tips and Tools template* provided as Appendix 1 and save it as a template (.doc) document.
2. Open the report document, click on "Tools," then "Templates & Add-ins."
3. Select "Attach" and then select and open *Format, Tips and Tools.* This will add the styles to your report document.

Please use the **Cover and Title Page Templates** provided as Appendices 2 and 3 to create the covers for your PIER final, interim or technical reports. If you have another type of report, please contact TechTransfer for guidance. Do not use these templates for Energy Commission Staff or Policy Reports.

These templates are effective January 2006. They may be periodically updated or changed. Please check online to ensure you have the latest version.

Appendix 1

Format, Tips and Tools

Centered Title, ct (not linked to TOC)

[Legal Notice/Acknowledgement Page/Table of Contents]

Centered TOC titles, toc (linked to TOC)

Heading 1,1

Heading 2,2

Heading 3,3

Heading 4,4

- Bullet, b

➢If items are numbered, use “Bullet, b” format, then click on the numbered list button on the formatting menu bar. That will change the bullets to numbers.

Figure title, ft

[Placed underneath figure]

Table title, tt

[Placed above table]

Normal (text of report)

Appendix 2

Arnold Schwarzenegger
Governor

TITLE GOES HERE: TYPE IN ALL CAPS AND USE LINE BREAKS WHERE THE TITLE NATURALLY BREAKS

PIER [FINAL, INTERIM, TECHNICAL] PROJECT REPORT

Prepared For:
California Energy Commission
Public Interest Energy Research Program

Prepared By:
Company Name Goes Here

Company Logo may be inserted here

MONTH YEAR [insert]
[Publication Number Here]

Appendix 3

Prepared By:
Company
Manager Name
City, State
Contract No. 000-00-000

Prepared For:
Public Interest Energy Research (PIER) Program
California Energy Commission

Name
Contract Manager

Name
Program Area Team Lead

Name
Manager
NAME OF OFFICE

Name
Deputy Director
NAME OF DIVISION

B.B Blevins
Executive Director

DISCLAIMER